

## Nutrition and WIC Services Management Evaluation Tool Tracking for Receipt and Disposition of Returned Formula

Agency / Clinic: \_\_\_\_\_ Date of ME: \_\_\_\_\_

Evaluator(s): \_\_\_\_\_

Using Tracking Sheet? Yes \_\_\_\_\_ No \_\_\_\_\_ Any expired formula on hand? \_\_\_\_\_

Count number of clients listed on the tracking sheet/issuance log within the last 6 months<sup>1</sup>. If less than or equal to 5 review all records; if more than 5 select approximately 10% (maximum of 8) to review and verify appropriate documentation in KWIC. Complete form and write comments on the back of the form. Place a check mark in column if information available/correct.

Client Name / Date of event	Client active when formula issued?	Formula brand, type (conc, pd, RTF), # cans	Return reason	Issuance reason / Appropriate?	Doc. in KWIC matches log; Amounts of formula equal; Did not provide beyond monthly max
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

Notes: \_\_\_\_\_ Total Charts Reviewed with Errors \_\_\_\_\_

Total Charts Reviewed \_\_\_\_\_

Percent of Charts Reviewed with Errors \_\_\_\_\_

<sup>1</sup> If no clients listed on the tracking sheet/issuance log within the past 6 months use the past 12 months.